

# Individual Development Plan (IDP) User Guide for Civilians/Officers/Auxiliarists

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## Introduction

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This developmental tool is intended for use by all Coast Guard civilian employees, officers and Auxiliarists. The need for an Individual Development Plan (IDP) guide and form was identified by the Civilian Needs Assessment (CIVNA) and Junior Officer Needs Assessment (JONA). The IDP is a valuable performance enhancement and career development tool. The following information is designed to acquaint you with the purpose, goals, steps, and value of an IDP.

**It is recommended that the supervisor and the subordinate work together on the IDP.**

It is recommended that you read the entire guide before you start working on your IDP.

## Definition of an IDP

An IDP is a tool to help individuals reach career goals within the context of organizational objectives. It is a developmental "action" plan to move the individual from where they are to where they want to go. It provides the systematic steps to build on strengths and overcome weaknesses as individuals improve job performance and pursue career goals. It is a tool for all personnel regardless of status or performance.

The most common objectives for having an IDP are to:

- Learn new skills to improve current job performance.
- Maximize current performance in support of organizational requirements.
- Increase interest, challenges, and satisfaction in current position.
- Obtain competencies necessary for a promotion or change in grade, series, or field.

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*An IDP is...*

An IDP is:

- A developmental partnership between the individual and supervisor. IDP preparation involves feedback, clarification, and discussion about developmental needs, goals, and plans. Supervisor-subordinate communication is key to the success of the IDP process.
- A vehicle to address the needs of the individual and the needs of the organization. The best IDPs begin with a plan to maximize current job performance. The activities can assist the individual in meeting both personal and organizational goals for success.
- A tool to identify a person's developmental needs based on a comparison of skills required by a job and present abilities. It identifies specific competencies for which the person requires development. The mutual interests and concerns of the individual and the organization must be considered in the IDP process.
- A tool to facilitate a relationship between a mentor and a mentee.
- A broadly defined developmental plan that includes on-the-job assignments, self-development activities, and formal classroom training.
- An active and ongoing process. An IDP is a living process that encourages individual empowerment and growth. Ideally, IDPs should be reviewed, updated, and changed as needed every six months.

*An IDP is not...*

An IDP is not:

- A one-time activity.
- A performance appraisal. The IDP should not be used as a means to formally assess the individual's performance and should not be used for human resources decisions (e.g.,

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promotions, etc.). It does not replace the performance evaluation form/system to determine advancements, promotion, pay, awards, etc. The purpose is professional development, not appraisal. *A person's decision not to carry out a developmental activity or achieve a goal should not impact his or her performance evaluation. Correct use of an IDP, however, will likely improve an individual's performance and behaviors.*

- A contract for training. An individual should include all training interests on an IDP. However, training is not necessarily guaranteed because it is on an IDP. Training decisions are made in accordance with Coast Guard policy and budgetary considerations.
- A way to clarify or revise a position description. If a position description does not accurately describe the duties performed, this is a matter for the individual, supervisor, and the personnel office to resolve. An IDP does not solve this problem.
- A guarantee of promotion to a higher grade/rank. An IDP can help prepare a person to become qualified for a higher graded position, but does not imply a guarantee of promotion.
- A fix for all supervisor-personnel relations problems. The IDP is only one part of the comprehensive efforts of an organization to enhance job satisfaction and cooperative work relationships.

### **Steps to an IDP**

There are five basic steps to creating an IDP:

Step 1: Conducting a Self-Assessment

Step 2: Meeting with a Career Counselor or Advisor

Step 3: Meeting with your Supervisor

Step 4: Implementation

Step 5: Follow-up

*Note:* If you are in a mentor/mentee relationship, you should meet with your mentor before beginning your IDP so the two of you

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can strategize the best approach to take as you go through the “Steps to an IDP.”

### *Step 1: Conducting a Self-Assessment*

There are different ways to assess your personality, interests, knowledge, skills, and abilities. To make completing an IDP easier, we recommend you conduct a self-assessment and then work with a career counselor to conduct a commercial assessment (see page 6 for information on conducting a commercial self-assessment). In addition, the Coast Guard Institute can conduct an Educational Assessment, which determines how your academic experience can be transferred to a college degree program.

### *Conducting an assessment of your competencies*

To conduct an assessment of your competencies, start by listing your knowledge, skills, and abilities. You can determine what they are by reviewing current and prior job performance and experience, training, education, and developmental activities to identify the knowledge, skills, and abilities you have. This background review provides concrete information regarding current abilities, strengths, and skills. Specifically, employees can review their training record; SF-171, OF-612, or resume; position description; performance evaluations; and any information about significant past training and other developmental activities. Officers can review their training record; performance evaluations; and any information about significant past training and other developmental activities. Go to CG Central (<http://cgcentral.uscg.mil>): My Workspace: Career Management: Officer for specific career information about you.

Once you have a basic understanding of your current knowledge, skills and abilities, you need to think about where you want to be in a year, two years, three years, etc. from now. Based on the data you have generated about yourself in your self-assessment, write these desires in the form of goals. A goal is a statement of a desired outcome or accomplishment which is specific, observable and realistic. Ask yourself:

- What do I want to accomplish by this time next year?
- What do I want to accomplish by the end of the second year?
- What do I want to accomplish by the end of the \_\_\_\_ year?
- What barriers or obstacles might prevent me from accomplishing my goals on time (e.g., time, money, other commitments, etc.)?
- What can I do to overcome these barriers or obstacles?

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- What resources are available to help me?

Conduct research pertaining to any occupations, assignments or positions that you desire. An excellent way to find information on federal government occupations and positions is at <http://www.opm.gov>. To explore the different types of occupations select Career Opportunities. An excellent way to find information on officer assignments and issues is at the Coast Guard Personnel Command's web site at <http://www.uscg.mil/hq/cgpc/opm/opmmain.htm>. Next, determine what knowledge, skills, and abilities you need to develop.

Draft your initial IDP following the steps in "The IDP Form" before moving to the next steps. Doing so will enable a career counselor, advisor, or supervisor to better understand your individual needs and goals.

### *Step 2: Meeting with a Career Counselor*

Meeting with a career counselor or advisor is *optional*. However, the objective of meeting with a career counselor is to review the information you have collected and developed so far, conduct a commercial self-assessment if you desire, and learn about goal setting, career fields, and career development resources that are available. A counselor can also assist you with documenting your goals and determining which competencies you need to develop to reach them.

The advantage of working with a Career Development Advisor (CDA), Command Staff Advisor (CSA), Education Services Officer (ESO) or Transition/Relocation Manager (TRM) is that they can often help you learn about opportunities that are available to personnel through the Coast Guard or external sources. They can also inform you about learning activities that may include formal training, a developmental assignment, on the job training, books to read, etc. They can even work with you to link the appropriate developmental activity to the competency and goals. *Keep in mind that you may not find the answer to all your needs or questions from one person since the roles of each of the positions listed vary depending upon their specific role/function in the Coast Guard.* You may need to work with several different types of career counselors or advisors to find the information you need to complete your IDP. See "Who Can Help?" on page 8 for more information on the services of a CSA, CDA, ESO, or TRM.

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### *Conducting a commercial self- assessment*

A CDA can assist you with a variety of self assessments including the Strong Interest and Confidence Skills Inventory (occupational, basic interest, personal style, etc.), Career Assessment Inventory (career decisions involving college, etc.), etc., which are all available through DANTES. In addition, some TRMs can assist you with the Myers Briggs Type Indicator, etc.

### *Step 3: Employee/member- Supervisor meeting.*

The objectives of the supervisor and direct report meeting are for the supervisor to provide feedback to the individual and to obtain mutual commitment between the supervisor and individual regarding the IDP plan.

Before meeting with the individual, a supervisor should:

- Determine if there are competencies that need to be enhanced to improve performance in the individual's present position.
- Be aware of training resources available.
- Be alert to organizational trends and/or planned changes that require the individual to develop different skills or enhance current skills.

The supervisor should also review *A Supervisor's Guide to Career Development and Counseling for Civilian Employees*, which is available at <http://www.uscg.mil/hq/cgpc/cpm/home/supindx.htm>.

The individual should provide the supervisor with a draft copy of his/her IDP prior to the meeting and should also bring a copy to the meeting. The supervisor needs to bring an understanding of the organization's needs and ideas or plans for developing the person to the meeting. Together they discuss:

- The individual's goals, interests, and career aspirations
- The organization's needs, expectations, and plans
- Developmental objectives for the individual on which both agree, activities that will achieve the objectives, schedule for activities, check-back points, and possible needs for revising or updating IDP.

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Together, they identify those competencies that are critical for the individual to have in order to reach professional career goals and his/her personal developmental needs. Also, they determine how the person can best achieve his/her goals.

The supervisor and individual must work together to adjust and prioritize the objectives of the person's IDP. If a developmental assignment or requested training course is not feasible, the supervisor should discuss the reasons for denial and recommend alternatives.

The individual prepares the final IDP. Both the individual and supervisor sign the IDP form indicating support of the plan. The individual keeps the original IDP and provides a copy to the supervisor.

### *Step 4: Implementation*

The individual implements the development plan, submits training requests as appropriate, actively participates in activities, and updates the supervisor on any changes.

### *Step 5: Follow-up*

The individual should routinely update and review the plan and meet with the supervisor every six months to determine progress and make changes.

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## **The IDP Form**

The following guidance will assist you in filling out the IDP form (Enclosure (4)).

### *General Information*

Provide name, position title, grade or rank, and unit.

### *State your goals*

Goals can be written in any format you choose. Begin by writing your goal for your **current position**. Next write your **short-term** future professional development goals. (Your current position goal and your short-term goal can be the same. If they are the same, there is no need to duplicate your work by listing them in both sections.) Short-term goals are generally actions you want to achieve within the next one to two years. Finally, write your long-term future professional development goals. Long-term goals are generally actions you want to accomplish within three to five or more years.

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Goals can be written in any format you choose. You can specify a rank, position, series, and grade (e.g., Lieutenant, Commanding Officer, Program Analyst GS-343-9), or simply a new qualification, skill, title, role, or private sector profession you wish to achieve (e.g., Team Leader, Senior Accountant). The more specific the plan, the better you can identify developmental activities that can help you reach your goal.

### *Identify competencies to be developed*

Identify those competencies (knowledge, skills, and abilities) that you want to develop for each of your goals. Civilians will find competencies critical for their current job in their EARS performance plan and job position description. Officers will find critical competencies at CG Center (<http://cgcentral.uscg.mil> under My Workspace: Career Management: Officer). You may also determine which areas need development with input from your supervisor.

Also, refer to the research you did in your assessment to identify the competencies you will need for your short-term and long-term professional goals. Identify those competencies that are critical for you to have in order to reach professional career goals and your personal developmental needs. With input from your supervisor, determine which areas will best help you reach your goals.

### *List developmental activities or actions to be taken*

Identify a developmental activity for each targeted competency. Explore developmental activities in the areas of *education* (e.g., a community college course in effective writing, accounting), *training* (e.g., on-the-job training such as assisting co-workers with duties or projects or formal classroom training such as a “C” School) and *professional development* (e.g., reading, joining Toastmasters, joining a professional organization). *Note:* All formal classroom training should have the source (e.g., USDA, Coast Guard Leadership and Management School) identified. For all activities, indicate the intended completion date.

### *List outcomes desired*

Identify what outcome you desire to achieve by obtaining that competency. For example, if a competency you desire is to develop your oral communication skills, your desired outcome may be that you can effectively communicate with others on your work team.



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### *Signatures*

Both you and your supervisor need to sign and date your completed IDP. Fill in the 6 month and 1 year review dates.

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## **Resources**

### *Who can help?*

The Coast Guard has a variety of experts and advisors in place to assist you with career information and/or planning. The knowledge and services of these personnel will vary depending on their job/role and their individual experience. You may have to work with several career counselors or advisors to get the assistance you need.

### *CG Career Development Advisor*

CDAs are located at Integrated Support Commands, TRACEN Cape May and the Headquarters Support Command. CDAs can assist you with career planning, professional development, educational development, and leadership development. They provide unit-wide and individual career development, as well as information pertaining to careers. CDAs are trained in how to develop an IDP.

### *CG Transition/Relocation Manager*

TRMs are located at Integrated Support Commands, TRACEN Cape May, and the Headquarters Support Command. TRMs can assist you in identifying your individual attributes, planning an effective and workable career strategy, and providing you feedback on career issues, options, and barriers. TRMs have a variety of career tools and some are certified career coaches.

### *CG Command Staff Advisor*

CSAs are located in twelve geographic sites and provide guidance and consultation to employees and their military and civilian supervisors and managers. The CSA is the first stop for information and assistance concerning civilian personnel issues in the Coast Guard.

### *CG Education Services Officer*

Full-time ESOs are located at every Integrated Support Command (ISC), Sector, Training Center, and various other units. All other units have an individual who serves as a part-time ESO. Once you have set your goals and determined your required activities, an ESO can provide you with information on various educational opportunities. For example, an ESO can assist you with college enrollment, counsel you on non-traditional education programs, assist in completing a Tuition Assistance form, assist in locating scholarships or loans, assist in enrolling in college video and

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audio courses, and administer or arrange for the administration of all DANTES sponsored examinations.

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### Developmental Activities

Remember, education and training are important but **learning** is paramount. Job, career, and personal development involve more than formal classroom training. Individuals are more likely to retain what they learn when actively applying the skill versus learning about it in a classroom. When preparing your IDP, consider all learning activities and assignments that are available to you. Possible activities and assignments include:

#### *Types of learning activities*

*Special Projects* - Work of infrequent nature given to an individual whose normal range of duties would not include that assignment. For example, to enhance planning skills, the individual may be asked to participate in developing a schedule, organizing a meeting/conference, etc.

*Detail* - A temporary assignment to another position, work unit, branch, division, or office. For example, to enhance writing skills and the ability to work as a team member, a person may be assigned to a task force organized to create a handbook describing a new program.

*Shadow Assignments* – The opportunity to accompany a technical expert or manager for a brief period to better understand the type of work being performed. For example, “shadowing” a civil rights specialist may increase one’s knowledge of affirmative action plans and programs.

*Job Rotation* - Temporary reassignment of duties from another position, but within the same occupational area, to the person’s position in order to broaden the individual. For example, a personnel management specialist that is normally involved in the staffing function could take on classification responsibilities.

*Collateral Duties* - Assignment of duties outside an individual’s normal range of responsibilities that provide a broadening experience. For example, a person may be assigned space planning responsibilities in order to enhance analytical and reporting skills.

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*Job Redesign* - Assignment of new responsibilities to a position for the purpose of utilizing an individual's natural abilities or interests. For example, assigning liaison responsibilities to an individual who would otherwise not deal with people outside their immediate work unit.

*Committee/Task Force Participation* - Involvement in workforce groups or special emphasis groups. For example, participation in Human Relations Committees.

*Professional Organizations* – Joining and/or volunteering with these organizations offers opportunities for the individual to develop a variety of organizational and leadership skills. Examples include, American Society of Military Comptrollers, American Society of Training and Development, Reserve Officer Association, Toastmasters, etc.

*“Acting” Assignments* - Temporary assignment of oversight responsibilities to an individual. In most cases, these responsibilities are to cover for a manager or supervisor that is out of the office.

*Discussion Groups* - Groups arranged with co-workers (to take place during lunch or after duty hours) for the purpose of researching and discussing technical, managerial, or supervisory skill areas.

### *Other options*

You can also read articles and books (one recommended source is the Commandant's Reading List), volunteer, do some research, interview senior/technical people, ask a co-worker to teach you a skill, train someone else, etc.

### *Where to find CG training information*

Look for internal Coast Guard training information in the annual training schedule available on the Training Quota Management Center's (TQC) web site, <http://www.uscg.mil/hq/tqc/index.htm>. Coast Guard wide Leadership and Professional Development courses can be found at <http://www.uscg.mil/leadership> (click on Training).

### *Where to find career and professional development information*

Coast Guard Career Central web site, <http://www.uscg.mil/leadership> (click on Career Central), is a central point for Coast Guard career, training, education and

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professional development information for all Coast Guard personnel: active duty, civilian, reserve, and auxiliary. Also check CG Central under My Workspace.

The Unit Leadership Development Program (ULDP), <http://learning.uscg.mil/uldp>, is designed to assess a unit's strengths and weaknesses in relation to the Coast Guard's leadership competencies. Leaders can review and share unit results with the crew, choose from a host of resources, and choose to partner with a ULDP coach to determine the most appropriate action to take.

The E-mentoring program, <http://www.uscg.mil/leadership> (click on Mentoring), contains a dynamic database in which people can sign up to be mentors and people can search for mentors. In addition to the database, the program supports mentors and mentees by creating a mentoring agreement and providing just-in-time instructions and automated notifications for key activities.

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To print or download a copy of this guide and form go to <http://www.uscg.mil/leadership> and click on "Individual Development Plan" or <http://learning.uscg.mil/uldp> and click on Individual Development Plan.